

Advocates for Basic Legal Equality & Legal Aid of Western Ohio

LONG-RANGE STRATEGIC PLAN

EXECUTIVE SUMMARY

*Accepted unanimously by the Boards of Trustees
May 26, 2005*

MISSION of the ORGANIZATIONS

Advocates for Basic Legal Equality, Inc. (ABLE) and Legal Aid of Western Ohio (LAWO) are non-profit regional law firms that provide high quality legal assistance in civil matters to help eligible low-income individuals and groups on Western Ohio achieve self-reliance, and equal justice and economic opportunity.

ABLE and LAWO have developed the Long Range Strategic Plan as a roadmap to articulate direction for the organizations' Board of Trustees, staff, and volunteers. On a practical level, it is a tool to guide us as we make decisions and set priorities. On another level, it is an articulation of a vision for the substance and the delivery of legal services. It is aspirational; it is not mandated.

The world has changed drastically in the last few years – and so have the needs of our clients and client communities and the ways in which we respond to those needs. The Strategic Planning Committee has sought to offer creative, sensitive, and innovative solutions that are at the same time practical and doable. We now need the courage and farsightedness to risk change as we begin to implement the plan. The plan is ambitious. In all probability, we will not accomplish everything. A plan gives a framework of choices that not only directs our activities, it limits them; it helps all of us know when to say “no.” We may make an informed decision not to follow up on certain objectives, or we may not be able to do it all. But if a new endeavor is not covered by the contents or the vision of the plan, it will not be considered as an option without prior review and amendment to the plan.

On the other hand, this document is meant to be a living one – subject to change. The action plan, which is attached, is for Year One. The Strategic Planning Committee will periodically review our progress in implementing the plan and amend it as needed. We will create an action plan for Year Two based on progress, timely issues, finances, and relevant unforeseen events.

VISION & PHILOSOPHY

We will use our resources creatively to optimize our capacity and ability to serve and make a long-term difference in the lives of marginalized and low-income persons in our communities.

As lawyers we have an obligation when we meet a client who is in crisis to use the opportunity to help the person see what is happening in their lives. We need to assist them to use the opportunity to create change.

- *Tanya Neiman, Director of the San Francisco Bar's Volunteer Services Program*

We will create new solutions to legal problems. We will continuously develop, implement, and evaluate improvements to our legal services delivery system.

We will focus on solving problems; be client-centered, rather than case-centered; and organize our work around what clients need rather than what lawyers do, with the goal of ultimately achieving individual and systemic improvements in the lives of our clients and our client communities.

THE PLANNING PROCESS

The Strategic Planning Committee identified the goals articulated in the plan during numerous meetings over a period of several months. The goals are based on advocate experience, organizational statistics, client outcomes, and two staff SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis meetings – one with the entire staff and one with support staff.

A board assessment was performed prior to a Board of Trustees retreat in September 2004. Results from the assessment provided most of the background for the section on governance.

ABLE and LAWO commissioned several surveys, the results of which are attached. Stanford H. Odesky and Associates used telephone interviews and written questionnaires to help determine the needs of low income people in our areas. Clients, persons with low incomes, and social service agencies were surveyed. We also conducted a client satisfaction survey of Legal Aid Line clients.

Several planning directives resulted from an October 2002 evaluation conducted by the Ohio Legal Assistance Foundation (OLAF). Those that remain relevant are included in the plan goals and objectives and a copy is attached.

HOW WILL THE PLAN CHANGE WHAT WE DO?

There are two basic platforms to the plan.

1. One is to optimize our ability to reach and assist more people more effectively. To accomplish that, we will use resources more creatively and we will increase the number and type of options for service delivery.

Some of those options:

- Increased reliance on technology
 - Use of clinics; pro se
 - Meeting clients in forums such as community centers, shelters, and senior centers
 - Beefing up pro bono in our communities
 - More collaborative efforts; increased, more careful referrals and coordination of services
2. The second premise involves taking a holistic approach to client problems. We want to focus on solving problems in a way that is client-centered, rather than case-centered. We will organize our work around what clients need rather than what lawyers do, with the goal of achieving individual and systemic long-term improvements in the lives of our clients and our communities.

We hope to accomplish this by the following means:

- Collaborations that lead to more efficient and effective services as we devote more resources to prevention and a holistic approach through education, training, and preventive advocacy, rather than crisis intervention.
- Increase in intra-agency collaboration. Advocates will draw on the resources and expertise available throughout our service areas. In addition, practicing as one unified law firm, in which attorney expertise is matched to client need, will help to ensure equal quality of representation in urban and rural areas.

STRUCTURE OF THE PLAN

The strategic plan is divided into sections: *Programs and Services* and *Organizational Effectiveness*. The *Programs and Services* section contains goals and objectives to address the following client needs: shelter, economic opportunity, health, safety, and civil rights. These areas of client need are not exclusive. Current societal and economic trends may lead to other systemic issues that we should be prepared to address. This section also includes service delivery goals and objectives.

The Strategic Planning Committee created a Work Group for each of the six categories of the *Programs and Services* section: Safety: Freedom from Abuse and Violence; Shelter: Safe, Stable, Secure Housing; Freedom from Civil Rights Violations; Health, Security, and Well-being; Meaningful Economic Opportunity; and Service Delivery.

Groups met or conference-called as necessary and made recommendations on how best to respond to the identified needs; those recommendations comprise the service/program goals of the strategic plan.

The *Organizational Effectiveness* section deals with Resource Development; Communications and Visibility; Finance; Human Resources; and Governance (goals and objectives for the Board of Trustees). The Committee created additional Work Groups to assess and create goals for organizational effectiveness. Within these areas, the Organizational Effectiveness Work Groups examined administrative and personnel policies and procedures; the extent to which procedures were disseminated, understood, and followed; and the additional facilities and equipment that staff may need to meet organizational goals and objectives.

The Work Groups also identified areas in which LAWO and ABLE may wish to retain outside consultants to assist with program assessment and development. These areas include quality, quantity, and diversity of staff; staff support, training, professional development, recognition, and compensation; and staff supervision, chain-of-command, job descriptions, goal setting, and evaluation.

GOALS - PROGRAMS & SERVICES

- 1. Safety: Freedom from Violence and Abuse:** Prevent domestic violence, improve the ability of victims of domestic violence to establish economic independence, and assist individuals and families in constructing and sustaining a positive environment.
- 2. Shelter: Safe, Stable, Secure Housing:** Resolve legal issues that may contribute to homelessness, loss of housing, or unsafe living conditions; provide tools to achieve permanent housing solutions.
- 3. Freedom from Civil Rights Violations:** Protect, defend, and advance the civil rights of all people.
- 4. Health Care, Security, and Well-being:** Help low-income people gain and maintain access to basic nutrition, mental and physical health, and disability benefits in order to achieve long-term self sufficiency.
- 5. Meaningful Economic Opportunity:** Assist low-income people to move permanently out of poverty into self sufficiency by removing barriers to employment, helping them gain access to the public benefits to which they are entitled, and protecting their rights on the job.
- 6. Service Delivery:** Develop a cohesive strategy for the delivery of client-centered services, using resources creatively to optimize our capacity to make a long-term difference in the lives of our clients and client communities. Solve legal problems by developing, implementing, and evaluating innovative approaches to the delivery of legal services.

Achieving these goals involves several related issues. One is resource development. Securing adequate funding for legal services has always been an uncertain affair. Because of the tenuous nature of our grant funding, we need to examine the benefits that our clients and our community derive from our services with an eye towards presenting our work so that non-lawyers understand it and people of any political persuasion will support it.

A second issue is the need to expand our community collaborations. Client centered advocacy is, by necessity, collaborative, which is why collaboration is an important component of the plan. Providing comprehensive services to clients requires that we focus on larger life issues that necessarily involve other stakeholders. Collaborations can lead to more efficient and effective services as we devote more resources to education, training, and preventive advocacy, rather than crisis intervention. We must build and maintain relationships with communities to enhance our mutual ability to meet the needs of people with low incomes. And we must be involved in expanding the capacity of legal professionals and other service providers to assist low-income individuals to resolve their legal problems.

The process of accomplishing these goals will also test our skills at intra-agency collaboration. Advocates will need to draw on the resources and expertise available throughout our service areas. In addition, practicing as one unified law firm, in which attorney expertise is matched to client need, will help to ensure equal quality of representation in urban and rural areas.

GOALS - ORGANIZATIONAL EFFECTIVENESS

- 1. Governance:** Ensure that the Boards of Trustees are fully prepared to govern, fulfill the basic responsibilities of a board, and that they are engaged in supporting the missions, programs, and strategic plans of ABLE and LAWO.
- 2. Resource Development:** Ensure that ABLE and LAWO have the resources necessary to support the organizations' missions, programs, and strategic plans.
- 3. Finance:** Ensure responsible management of fiscal resources and effective reporting and monitoring of expenditures.
- 4. Communications and Visibility:** Implement strategies to ensure that our communities view ABLE and LAWO as well established and respected law firms and human rights organizations and that our services are clearly recognized, understood, and valued by potential clients, the general public, and other organizations.
- 5. Human Resources:** Recruit, develop, support, and retain a talented, diverse, professional, dedicated, and empowered workforce to fulfill the organizations' missions, to implement programs, and to effectively deliver or support the delivery of services to marginalized and low-income clients and client communities.
- 6. Facilities and Equipment:** Achieve and maintain efficient, comfortable working and meeting space and ensure that all staff have access to the equipment and technology needed to fulfill their duties and responsibilities.

INNOVATION

It does not necessarily follow that every portion of an innovative plan will be subject to implementation or that, when implemented, it will produce the anticipated results. If we can learn from unanticipated and even unsuccessful experiences, the results become *instructive failures*.

Innovation is finding new or better ways to think about the needs of the clients, finding new and useful approaches. Innovation requires creative thinking and leadership, sometimes involving risk taking or a leap of faith, and may include instructive failures. It is an ongoing process of improvement, adaptation, and change.

- *National Association of IOLTA Programs report on strategic planning to promote innovative legal service delivery models.*

The IOLTA report cited above reached several noteworthy conclusions regarding planning and innovation in legal services:

***Innovative planning builds relationships and community.
It requires leadership and builds leadership.***

***Planning involves listening – expanding the conversation beyond the specific problem,
looking at the bigger picture, the whole person, the whole family, and the community.***

***Visionary planning is never static. There is constant adaptation based on evaluation and a
commitment to ongoing assessment of client and community needs.***

People create innovation. It is always the people who make a difference.

IMPLEMENTATION & EVALUATION

Guidelines for implementation and for evaluation are critical parts of the planning process. Our Strategic Planning Committee has identified some overlying practical questions that we will need to address in implementation of the plan. These include staff duties and responsibilities; supervision of the implementation process; motivation of staff in support of the plan; expenditures that might be needed to implement the plan's goals and objectives; and communication of the plan to outside supporters and other interested parties. To address many of these issues, we have prepared action steps, with quarterly milestones for Year One priorities.

The milestones will serve as guideposts for the first year; they will also serve as tools for evaluating our progress. Success will be measured, as well, through our traditional methods of looking at case outcomes, number of people served, financial awards, and success stories.

A LAST WORD

Many people, committee members and others, made substantive contributions to the plan. They also pointed out omissions, inconsistencies, and duplications as we strove to achieve clarity and simplicity. If the plan is difficult to wade through at times, that is probably because of the numerous people who were involved. But the trade-off is worth it. This plan truly reflects input from those who will be responsible for its implementation.

**ADVOCATES FOR BASIC LEGAL EQUALITY
LEGAL AID OF WESTERN OHIO**

LONG RANGE STRATEGIC PLAN

PROGRAMS AND SERVICES

GOALS AND OBJECTIVES

SAFETY/FREEDOM FROM VIOLENCE AND ABUSE

Goal: Decrease the incidence of domestic violence, improve the ability of victims to establish economic independence, and assist individuals and families in constructing and sustaining a positive environment.

OBJECTIVES

1. Provide holistic services to victims of domestic violence.
2. Enhance capacity of collaborative organizations to handle domestic relations cases, in particular cases not involving domestic violence.
3. Work to decrease the incidence of domestic violence and stalking in our communities, including elder abuse and neglect.

SHELTER

Goal: Resolve legal and discrimination issues that may contribute to homelessness, loss of housing, or unsafe living conditions; provide low-income persons with tools to achieve accessible, affordable, permanent housing solutions.

OBJECTIVES

1. Assess and establish priorities to address the root causes of housing issues.
2. Collaborate with other organizations to address the root causes of problems; develop a holistic approach to homelessness prevention: and provide people with the means to become self sufficient.
3. Develop and implement proactive and preventative assessment of housing issues and advocacy strategies.
4. Provide comprehensive housing community legal education programs in each county.
5. Work to promote and maintain an adequate stock of safe, viable, and affordable housing low-income persons.
6. Evaluate the role of Legal Aid Line in identifying and resolving housing issues.
7. Increase ability to provide services to more clients. (See SERVICE DELIVERY.)
8. Work to ensure adequate housing for mental health consumers.

SAFETY**FREEDOM FROM CIVIL RIGHTS VIOLATIONS**

Goal: Protect, defend, and advance the civil rights of all people through advocacy, legislation and administrative advocacy to accomplish systemic change.

OBJECTIVE

Prevent and address civil rights violations involving migrant workers, immigrants, persons with LEP issues, minorities, persons with disabilities, the elderly, and those with low income.

HEALTH, SECURITY, AND WELLBEING

Goal: Help low-income people gain and maintain access to basic nutrition, mental and physical health, and disability benefits in order to achieve long-term self sufficiency.

OBJECTIVES

1. Address the problem of lack of communication and collaboration among resources.
2. Identify issues early to avoid crisis situations; intervene on behalf of clients to avoid a downward spiral into additional problems.
3. Embark on a study and a plan to create a legal/medical partnership as a model of a holistic approach to providing legal services to low-income children and families who have entered the medical system. (Family Advocacy Plan)
4. Assess need for increased involvement in special education issues.

MEANINGFUL ECONOMIC OPPORTUNITY

Goal: Assist low-income people to move permanently out of poverty and into self-sufficiency by removing barriers to education and employment, helping them gain access to the public benefits to which they are entitled, and protecting their rights on the job.

OBJECTIVES

1. Avoid emergency situations through early identification of legal issues and intervention before clients are in crisis.
2. Increase options for expediting solutions for less complicated legal problems. (See SERVICE DELIVERY.)
3. Expand approaches to implementing long-term, multi-disciplined solutions to removing barriers to economic opportunity.

SERVICE DELIVERY

Goal: Create a cohesive strategy for the delivery of client-centered services, using resources creatively to make a long term difference in the lives of our clients and client communities. Solve systemic and individual problems by developing, implementing, and evaluating innovative approaches to the delivery of legal services.

OBJECTIVES

1. Re-evaluate system of service delivery to determine if the structure should be revised. Identify, define, and confront critical issues; clarify priorities.
2. Research innovative, practical approaches to optimize resources for assisting clients whose legal needs are relatively uncomplicated.
3. Operate as one unified law firm in which cases are assigned to match attorney expertise with client need.
4. Increase focus on prevention and ability to intervene on clients' behalf before crises develop.
5. Expand collaborative approaches to implementing long-term, multi-disciplinary solutions to removing barriers to economic opportunity. Build and maintain relationships with legal professionals, other service providers, and clients to enhance our mutual ability to meet client needs.
6. Use technology to make legal information, referrals, and pro se resources even more accessible to clients and to the third-party advocates who serve them; use technology to improve staff efficiency.
7. Determine the feasibility of serving the working low-income population with incomes that exceed our eligibility guidelines by charging those clients on a sliding fee scale.
8. Determine responsibility for implementation, coordination, and evaluation of the strategic plan.
9. Review patterns of clients who return for additional services or who have multiple issues.

**ADVOCATES FOR BASIC LEGAL EQUALITY
LEGAL AID OF WESTERN OHIO**

LONG RANGE STRATEGIC PLAN

ORGANIZATIONAL EFFECTIVENESS

GOALS AND OBJECTIVES

GOVERNANCE

Goal: The Boards of Trustees will be fully prepared to govern, fulfill the basic responsibilities of a board, and commit to being engaged in supporting the missions, programs, and strategic plans of ABLE and LAWO.

OBJECTIVES

1. Develop and implement structures, policies, and procedures that will create more effective Boards of Trustees.
2. Clarify expectations of board membership.
3. Expand board role and responsibility in fund raising.
4. Establish a protocol for regular evaluation of the strategic plan and recommendation for revisions as necessary.
5. Expand ways by which board members receive ongoing education and information on programs and services.
6. Address problems created by expanded geography.
7. Communicate our mission and the concept of equal justice to the public.

RESOURCE DEVELOPMENT

Goal: Research, identify, and seek the resources necessary to support the organizations' missions, programs, and strategic plans.

OBJECTIVES

1. Increase and diversify the organizations' resources. Develop a plan to increase revenues by 50% over next five years.
2. Increase proceeds from private sector fundraising campaign.
3. Establish an annual event in Dayton; continue with Toledo's annual awards dinner.
4. Implement plan for increased Board involvement in resource development.
5. Ensure accurate, comprehensive reporting of program and project activities to funders.
6. Develop an effective cy pres strategy.
7. Implement an efficient data base.
8. Evaluate creating funding partnerships with those interested in purchasing staff-delivered services.
9. Maintain current grant dollars and increase total grant dollars.
10. Work with resource development team to enhance external and internal develop-related communications.
11. Establish an endowment and a planned giving program.
12. Establish criteria for deciding what grant opportunities to pursue. Be certain that the funds we seek respond to priorities set by the long range plan.

FINANCE

Goal: Ensure responsible management of fiscal resources and effective reporting and monitoring of expenditures.

OBJECTIVES

1. Maintain an annual budget that accurately reflects anticipated revenues and expenses.
2. Maintain a financial reporting system that effectively monitors the financial status of the organizations.
3. Have proper checks and balances in place.
4. Remain aware of and responsive to funding restrictions.
5. Provide the Boards of Trustees with tools and information necessary to evaluate the organizations' fiscal status and to make decisions accordingly.

COMMUNICATIONS AND VISIBILITY

(For internal communications, see HUMAN RESOURCES, Objective 7.)

Goal: Ensure that communities we serve view ABLE and LAWO as established and respected human rights organizations and that our legal services are clearly recognized and understood by potential clients, the public, and collaborators.

OBJECTIVES

1. Enhance the visibility of ABLE and LAWO through increased communications among targeted audiences.
2. Develop an organization-wide message on how legal aid makes a difference in the lives of individuals and the value of legal aid to the community at large.
3. Develop and enhance relationships with a broad group of supporters to expand community and political support for LAWO and ABLE and to increase funding.
4. Implement an issues marketing plan to inform and educate other service providers about ABLE and LAWO's programs and services.
5. Build a strong community support network by developing, nurturing, and maintaining relationships with targeted audiences, including clients and donors.
6. Demonstrate LAWO and ABLE's commitment to the communities we serve through a range of communications efforts.

HUMAN RESOURCES

Goal: Recruit, develop, support, and retain a talented, diverse, professional, dedicated, and empowered workforce to fulfill the organizations' missions, to implement programs, and to effectively deliver or support the delivery of services to marginalized a low-income clients and client communities.

OBJECTIVES

1. Ensure that all staff members have well defined duties, responsibilities, authority, and expectations and that their workload is commensurate with same.
2. Ensure that the salary administration plan and benefits package enable LAWO and ABLE to attract and retain a diverse and highly skilled staff.
3. Ensure that ABLE and LAWO recruit, retain, and promote a diverse workforce.
4. Recognize staff contributions towards meeting significant organizational goals.
5. Ensure all staff are well supported in their position and have opportunities for professional growth.
6. Maintain current and comprehensive administrative and personnel policies and procedures for all staff positions.
7. Maintain and enhance internal staff communications, collaborations, and connectedness.
8. Continue to respond to issues related to restructuring of programs.
9. Address issues related to staff turnover. (For details, see IMPLEMENTATION, Action Steps for Year One.)

Implementation of ABLE and LAWO Strategic Plan
Action Steps to begin July 1, 2005

TASKS	QTR 1 MILESTONES	QTR 2 MILESTONES	QTR 3 MILESTONES	QTR 4 MILESTONES
Expand family law Pro Se clinics in pilot counties. See Safety, Obj. 2	Develop/review standards and protocols for pro se family law materials. Identify curriculum. Consider taping 1 st clinic to show to future classes.	Identify one rural county and one urban county to serve as pilots; communicate with courts in those counties to obtain input & buy-in.	Begin pro se clinic in rural county (probably Findlay satellite office); evaluate results.	Expand pro se clinic in urban county; evaluate results from both urban and rural; set schedule for expansion in Year Two.
Develop model holistic advocacy analysis for domestic violence clients. See Safety, Obj. 1	Family law work group will identify common legal and economic needs for domestic violence clients; identify potential collaborative agencies and resources to address needs	Develop model holistic advocacy screening tool for domestic violence advocates in rural pilot county; begin integrating advocacy tool into case work for that county.	Develop model holistic advocacy screening tool for domestic violence advocates in urban pilot county; begin integrating advocacy tool into case work for that county.	Evaluate results for urban and rural pilot counties; plan expansion into additional counties for Year Two.
Institute a community education campaign on rent escrow and predatory lending issues. See Shelter, Obj. 4	Housing work group will develop outlines for rent escrow and predatory lending issues.	Revised, edit, translated, and format materials for both print and on-line distribution.	Coordinate campaign for community outreach and media appearances to push content.	Continue outreach campaign; evaluate training for community groups to expand distribution of information in Year Two.
Make effective use of AmeriCorps Members. See Shelter, Obj. 3	Establish committee to coordinate work of AmeriCorps Members with AmeriCorps Coordinator, if hired.	Ensure continuation of project: Work with administrative unit to replace Team Members as terms of service expire.	Provide Members with continued mentoring, training opportunities, and volunteer opportunities in the community.	Evaluate program and continue to assess its value.

TASKS	QTR 1 MILESTONES		QTR 2 MILESTONES		QTR 3 MILESTONES		QTR 4 MILESTONES	
	Set up a specialty team to respond to Social Security cases (with the exception of hearings).	See Service Delivery, Obj. 3	Revise protocols and standards for handling SS cases, including intake screening materials for LAL; organize regional advocacy teams to handle all SS advocacy regardless of where case originates.	See Economic Opportunity, Obj. 2	Evaluate feasibility of four-county pro bono panel in Defiance, Williams, Fulton and Henry counties.	Revise pro bono outreach and case placement in Hancock County; survey existing rural pro bono attys.	Develop protocols and criteria for setting up a Center in Findlay satellite office; collaborate with local bar and social service agencies to determine what kinds of info and resources should be available.	Evaluate progress and results; plan expansion for team approach in additional counties in Year Two.
Develop our capacity for inter-office service delivery. See Service Delivery, Obj. 3	Use team of LAWO Toledo attorneys for bankruptcy hearings.		Select two rural counties in northern region and two in southern region to begin assigning SS cases on a regional basis.		Begin assigning SS cases from Montgomery County on a regional team basis.		Begin assigning SS cases from Montgomery County on a regional team basis.	Determine if additional teams would optimize service delivery.
Develop Social Security “team approach” for handling disability cases. See Economic Opportunity, Obj. 2								
Expand Pro Bono in rural counties. See Service Delivery, Obj. 2								
Pilot “Neighborhood Walk-In Center approach in Hancock County. See Service Delivery, Obj. 2								

TASKS	QTR 1 MILESTONES	QTR 2 MILESTONES	QTR 3 MILESTONES	QTR 4 MILESTONES
Expand lists of community resources. See Service Delivery, Obj. 5	Develop “model list” template of community resources. Refine current United Way lists.	Info gathering begins for Montgomery County; develop template to integrate results in intranet.	Info gathering begins for Lucas County; list completed for Montgomery County.	List completed for Lucas County; plan developed for updating; schedule established for completion of lists in remaining 30 counties.
Complete video-conferencing network.	Install multi-point video bridge for existing video stations in Toledo, Dayton, Lima, Defiance, and Mansfield	Complete staff training for Pika features.	Evaluate Pika integration and exchange reports templates and other Pika modules with other Ohio legal services providers.	Evaluate development of Pika links with other social services agencies and collaborative partners.
Pilot holistic LAL screening for clients who call with different legal problems more than twice in 24 months. See Service Delivery, Obj. 9	Develop templates and criteria for model protocols to give holistic screening to “repeat” clients.	Target two rural counties – one north and one south – to pilot holistic screening approach; cap assessments at pre-set number per week.	Target one urban county to pilot holistic screening approach; cap assessments at pre-set number per week.	Evaluate progress and results; plan expansion for holistic screening in additional counties in Year Two.
Improve Legal Aid Line phone system. See Service Delivery, Obj. 6	Evaluate options and potential costs for installing automated call-back features on Legal Aid Line phones to reduce client hold time.	Identify grant funding or additional budget sources to pay for phone system upgrade.	Install phone system upgrade; train staff and publicize to client community and social services agencies.	Evaluate benefits of phone system upgrade; repeat 2004 client satisfaction survey to measure and compare results.

TASKS	QTR 1 MILESTONES	QTR 2 MILESTONES	QTR 3 MILESTONES	QTR 4 MILESTONES
Provide Pika upgrades and training. See HR, Obj. 5	Complete debugging and installation of upgraded Pika software.	Complete staff training for Pika features.	Evaluate Pika integration and exchange reports templates and other Pika modules with other Ohio legal service providers.	Evaluate development of Pika links with other social services agencies and collaboration partners.
Ensure a diverse workforce, focusing initially on organizational culture, recruitment, hiring, & retention of staff. See HR, Obj. 3	Plan retreat for diversity committee. Hire a consultant to facilitate & help assess organization culture & to encourage open dialogue. Hold retreat.	Participate in LAWO & ABLE's environmental survey. Identify strengths & weaknesses re diversity revealed by survey.	Give positive feedback to staff about strengths; devise a plan to address identified weaknesses.	Evaluate accomplishments of diversity committee. Develop a work plan for Year Two.
Develop a system for prioritizing & budgeting time. See HR, Obj. 1	Make time management part of work plans: Allocate percentages of time to caseloads, preventative work, litigation, meetings & community work.	Alter LAL & case acceptance guidelines to realistically reflect staff capacity.	Clarify & designate responsibility for coordination of legal work. Clarify chains of command.	Evaluate effectiveness of time management, of case acceptance guidelines, & of coordination of legal work.
Examine incentives that will increase staff longevity with the organizations. See HR, Obj. 9	Investigate possibilities re loan forgiveness and/or scholarships for students who commit to 3 years service in legal services. (Greater Boston Legal Service has a model loan forgiveness program.)	Examine possibilities of developing such programs with law schools. Investigate like programs.	Investigate awarding sabbaticals after a certain term of employment. Investigate increasing annual leave after ten years of employment.	Study results and implement incentives as indicated.